

**Date:** August 10, 2009

**To:** Market Analyst

**From:** David Boulanger, Township Supervisor

**Re:** Analysis of the Market for Senior Housing

Oak Park Township has received a \$15,000 grant from the State of Illinois Department of Commerce and Economic Opportunity (DCEO) to commission a third party consultant study to determine the need for additional, affordable senior housing in Oak Park. The senior population of particular interest is low to moderate income seniors who do not qualify for the available subsidized housing but who cannot afford market-rate senior apartments now available. Factors to be investigated include age range, income level, care and/or mobility status, and degree of special need due to mental impairment.

Oak Park Township in cooperation with its community partners – the Oak Park Housing Authority and the Village of Oak Park – invites you to submit a proposal to conduct the described study. Responses are due September 16. For more information and/or an electronic version of the enclosed RFP, contact me or Gavin Morgan, Township Manager, at (708) 383-8005. E-mail: [dboulanger@oakparktownship.org](mailto:dboulanger@oakparktownship.org) or [gmorgan@oakparktownship.org](mailto:gmorgan@oakparktownship.org).

**Request for Proposal**

**Professional Services to Perform an Analysis of the Market for Senior Housing**

**Oak Park Township, Illinois**

**RFP: 09-OPTSS01**

August 10, 2009

Proposals Due: September 16, 2009, 3:00 PM

Oak Park Township

105 South Oak Park Avenue

Oak Park, Illinois 60304

## **Request for Proposal**

### **Professional Services to Perform an Analysis of the Market for Senior Housing**

#### **Oak Park Township**

August 10, 2009

Oak Park Township, an Illinois unit of local government, in cooperation with the Oak Park Housing Authority and the Village of Oak Park, is accepting proposals from professional firms to perform an analysis of the market in the Township for senior housing. The purpose of the study is to ascertain the extent to which the seniors in the Township do or do not have sufficient options and opportunities for housing such that they are able to remain in the community. The senior population of particular interest is low to moderate income seniors who do not qualify for the available subsidized housing but who cannot afford the market-rate senior apartments now available. The study is funded by a Local Government Assistance grant from the State of Illinois Department of Commerce and Economic Opportunity (DCEO),

This Request for Proposal (RFP) is open to both individuals and corporations licensed to do business in Illinois, within the provisions stipulated herein, regardless of race, sex, creed, religion, national origin, sexual orientation or veterans' status. The Township will accept proposals until 3:00 PM CST on September 16, 2009 at its offices at 105 South Oak Park Avenue, Oak Park, Illinois 60302. Questions should be directed to the Township Manager, Gavin Morgan, at 708-383-8005.

#### **I. Background**

Oak Park Township, Illinois, was established in 1903, under Illinois Statute (60 ILCS 1/35-50.2), to provide public services to the citizens of the Township. The Township is geographically coterminous with, but separate from, the Village of Oak Park. The Township is governed by a duly elected Supervisor and a Board of Trustees who are legally empowered to place a tax levy on the real property in the Township, within statutory limitations, in order to support its operations. Through such levy, the Township provides its citizenry with services for seniors, at-risk youth and individuals in need of General Assistance. The Township Board also appoints the members of the Community Mental Health Board (CMHB) and approves its funding.

As such, seniors are a primary constituency served by Oak Park Township. The Township currently provides meal service, transportation, case management, tax advice, chore assistance and a wide variety of other services to the seniors in Oak Park. While the Township also helps seniors find and evaluate certain housing options, it does not currently own or directly manage any senior housing facilities, developments or units.

Oak Park and nearby communities have a variety of options for senior housing, including multiple subsidized options for low-income seniors and market options for middle to upper-income seniors, both with a range of supportive services. There is the impression, however, that there are fewer affordable options for lower-middle income seniors who wish to remain in the community – including individuals who may need assisted living – but there is no data to support or contradict this perception. The Township supports a continuum-of-care and intergenerational living as beneficial to all segments of the community. Affordable housing for seniors at all income levels is an important Township goal.

The Local Government Assistance grant from DCEO is to gather objective data via a professionally performed study to ascertain the size and characteristics of the local senior housing market and, in particular, whether one or more unaddressed needs actually exist. Both the Village of Oak Park (“the Village”) and the Oak Park Housing Authority (“the Housing Authority”) were signatories to and supporters of the application to the State for the grant.

The Township, under Public Act (60 ILCS 1/35-50.2), is authorized to issue revenue bonds for the purpose of constructing or rehabilitating senior housing. Such bonds cannot, by statute, be funded through the Township tax levy but rather are supported through revenue generated by such housing facilities.

Should the study demonstrate objectively that:

- A. one or more segments of the local senior population are underserved in terms of housing options, and that
- B. the rent that could be commanded by such other option(s), along with other financial advantages for a publicly-owned facility, could sufficiently and completely fund its construction and operation,

the Township may choose to exercise its statutory authority, form a development team with other appropriate elements of local government, advertise for and identify a suitable private development partner, issue such non-tax-supported bonds, and construct such housing in the community. There is currently no specific site under consideration for such a development. As with private developments, the identification and conditions of purchase of such land would also be a determining factor.

It is not the intent of the Township, should it choose this option, to become an entity that operates public housing. The Township, under such a scenario, would serve as the funding entity and, as required, the landowner.

It is also important to note that the same statute that authorizes the Township to issue non-tax-supported bonds also requires that the Township put a referendum to its citizens to receive the authority to do so. The wording and other circumstances of such a question are also stipulated therein.

Nonetheless, at such point as the study may indicate that sufficient demand and financial potential exists, and at such point as the required referendum has passed and the Village and/or the Housing

Authority may also be amenable, the Township may issue an RFP for a private firm or team to design and construct such a senior housing development in the Township, to be ultimately owned by the Township and paid for from the proceeds of the revenue bonds.

## **II. Scope of Work**

The Scope of Work for the successful respondent to this RFP will include the following:

- 1. Develop an appropriate and professionally structured and administered methodology to obtain the types of information needed, as outlined above.**

The outline stipulated in the response (see below) will form the structure of the work to be performed. Should the Township desire a material deviation from the structure of a respondent's proposal, subsequent to the submittal, the respondent will be allowed to submit a revised proposal, including revisions to elements such as the number of data points to be obtained, to arrive at a mutually-agreeable contracted scope.

- 2. Perform required data gathering efforts.**

The specific data gathering method(s) will be enumerated in Section III below.

- 3. Analyze the data obtained.**

- 4. Develop a demographic and economic profile of populations identified to be underserved.**

This is one of the critical desired outcomes of the study. The Township needs to know the size and characteristics of any one or more segments of the senior population that are currently underserved through the available senior housing options within Oak Park itself. Elements to be identified include age groupings and numbers, populations at various levels of medical conditions and needs, numbers at income levels, years in the community, current housing situations, etc. Information is also needed about housing options both in and within close proximity to Oak Park but the target population for the study is the senior population of Oak Park itself. The study does not require a comprehensive inventory of the entire senior population but rather a representative sampling and means of justifying the selection of that particular subset.

- 5. Provide data of rental revenue capacity of such populations.**

As important as identifying the individuals and their needs groups is the need for to understand the level of financial capacity that underserved individuals have to pay for housing. The purpose of the study is not to identify which seniors necessarily have the greatest challenges in paying for housing but rather which seniors have the fewest or no options for housing at the levels they are able to afford. It is expected that such data may allow the Township to develop a pro forma for a development to serve those underserved seniors.

**6. Present data, analysis and conclusions in a printed report and present said report at a public meeting of the Township Board of Trustees.**

**III. Criteria for Evaluation**

The fee for this study is set by the provisions of the state grant; the successful respondent will receive the lump sum of \$15,000.00 (fifteen thousand and 00/100 dollars) upon acceptance of the final study report at the presentation of its findings in the public meeting of the Board of Trustees. Therefore, no fee component of the proposal is required. The basis of evaluation of proposals, therefore, will be the qualifications of the respondent, the quality of its proposed efforts and the quantity of data to be obtained and analyzed.

The criteria for evaluation of proposals should also form the structure of the proposals submitted. These criteria will receive a weighted evaluation as noted:

**A. Qualifications of the Firm (20%)**

The firm will submit information about the firm's (or individual's, if submitting as an individual) capacity and history of performing studies of this type.

The firm will submit at least three (3) examples of similar prior studies. These do not necessarily need to be studies of a senior population, nor do they necessarily need to be studies of housing needs. However, the closeness in scope of these examples to the scope required under this RFP will be part of the evaluation of this aspect of the respondent's qualifications. The information of these prior examples must include the following information:

- Client name and address
- Date, title, and abstract of the example study
- Client contact name, title, telephone number and email address (if applicable)
- Subsequent action taken as a result of the study (if any)

One of the example studies, in printed and bound or standard electronic form (Word or Acrobat), must also be submitted for the Township's evaluation. As necessary, the Township will agree to hold such example and its conclusions and data confidential and will return it to the respondent, at the respondent's expense.

**B. Qualifications of the Assigned Personnel (30%)**

Submit the following information about the individual(s) to be assigned to perform the Study:

- Name
- Role to be performed in the study

- Education
- Professional registrations or certifications
- Awards and publications
- Work history (firms, projects)

It is not necessary to include specific information about any individual(s) who may be contracted by the respondent to gather or help gather data in the field, unless the respondent deems such information to be pertinent to consideration of the firm's qualifications. The Township is looking in this section for the qualifications of the primary professional(s).

If one or more of the assigned individuals were not involved in any of the example studies submitted under Criterion A, then other similar contact reference information must be provided for such individual(s).

### C. Proposed Study Methodology (50%)

The respondent will submit a plan for gathering the data required, as outlined above. Note; consultation with the Township subsequent to award may require modification of the approach to be utilized and/or the model upon which it is based. The respondent will be afforded the opportunity to submit a revised proposal should this be the case. The methodology submitted with the response will include:

- **Academic and/or scientific basis for selecting the expected specific model.** This information will include source citations and the experience of the firm and/or assigned personnel with the particular method.
- **Study approach.** This will include primary elements, data sources to be sought, data gathering methods, key milestones, goals at each milestone, metrics, personnel involved and expected duration.
- **Roles and responsibilities** of the project team.
- **Data gathering tool(s).** This will include generic or example questionnaire(s) or other tools expected to be used and supporting information as to their efficacy.
- **Analytical method.** This is information about the methods for analyzing the data collected and the projected outcomes.
- **Report structure.** This will be a prototypical table of contents for the final report and a narrative describing the information expected to be provided in each section.

### D. Compliance, Conflict of Interest and Collusion Statement

The respondent will submit a signed original copy of the Statement appended to this RFP, stating in essence that the respondent firm or individual:

- is in compliance with all applicable requirements for anyone receiving funds from a grant from the State of Illinois and from Oak Park Township
- does not include any whole or part owner or employee who has any financial interest in or involvement with any other program receiving funds from the Township or any such similar conflict of interest
- has not contacted, or if so has not altered their approach to responding to this RFP upon communication with, any other firm or individual submitting a response to this RFP

While not a scoring criterion (see below), the absence of such signed and notarized Statement will serve as disqualification from consideration for award.

#### **IV. Award and Schedule**

Upon receipt of the submittals, the Township will convene an evaluation panel. The panel will include:

- the Township's Director of Senior Services,
- the Township Manager,
- two representatives from the Township's Senior Services Committee,
- at least one member of the Board of Trustees (selected by the Supervisor),
- one representative from the Village of Oak Park, and
- one representative from the Oak Park Housing Authority.

The members of the panel will be asked to review all of the submittals and rank them on a one-to-five scale for each of the criteria noted above. The criteria rankings will be multiplied by the percentage number (i.e. x 20 for 20% etc.) and a whole score for each submittal will be totaled. The Township Manager will then further review the highest scoring submittal with the Township Attorney for form, legality, conflict of interest, etc. and will certify such submittal to the Board for approval at a subsequent regular meeting.

The Township will accept proposals until 3:00 PM CST on September 16, 2009 at its offices at 105 South Oak Park Boulevard, Oak Park, Illinois 60302. Questions should be directed to the Township Manager, Gavin Morgan, at 708-383-8005.

**Attachment**

**Compliance, Conflict of Interest and Collusion Statement**

(Signed form required of all applicants)

Name: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Representing the firm or individual above responding to the Oak Park Township RFP to *Perform an Analysis of the Market for Senior Housing*, I affirm that we:

1. Are in compliance with all applicable requirements for anyone receiving funds from a grant from the State of Illinois\* and from Oak Park Township
2. Have no owner or employee who has any financial interest in or involvement with any other program receiving funds from the Township or any such similar conflict of interest
3. Have not communicated with any other firm or individual submitting a response to this RFP, or if so, have not altered our approach to responding to this RFP based upon that communication.

Name of representative \_\_\_\_\_

Signature \_\_\_\_\_

Title: \_\_\_\_\_ Date: \_\_\_\_\_

\* The Department of Commerce and Economic Opportunity, the Office of Inspector General, and the Auditor General of the State of Illinois, or any of their duly authorized representatives, will have full access to and the right to examine any pertinent books, documents, papers and records of any subcontractor involving transactions related to this project for a period of four (4) years following the Department's approval of all required close-outs (financial and/or programmatic).